



# ***Open Payments***

## **Phase 1 Step-by-Step CMS Enterprise Portal Registration for Physicians and Teaching Hospitals**

### **O P E N P A Y M E N T S**

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**CREATING PUBLIC TRANSPARENCY  
INTO INDUSTRY - PHYSICIAN  
FINANCIAL RELATIONSHIPS**

**June 2014**

***CMS Disclaimer: This information is a summary of the final rule implementing Open Payments (Medicare, Medicaid, Children's Health Insurance Programs; Transparency Reports and Reporting of Physician Ownership or Investment Interests [CMS-5060-F], codified at 42 CFR Parts 402 and 403) The summary is not intended to take the place of the final rule which is the official source for information on the program.***

# Open Payments (the Sunshine Act) Review

## Who is responsible for reporting?

Applicable manufacturers of covered products AND entities under common ownership with applicable manufacturers who also provide assistance and support are required to annually report to CMS:

- Payments or other transfers of value made to physicians and teaching hospitals.
- Certain ownership or investment interests held by physician owners or investors or their immediate family members.

Applicable group purchasing organizations (GPOs) are required to annually report to CMS:

- Payments or other transfers of value made to physicians.
- Certain ownership or investment interests held by physician owners or investors and their immediate family members.

# Open Payments (the Sunshine Act) Review

## Who is reported on?

### Covered Recipient Physicians

- Doctors of medicine or osteopathy practicing medicine or surgery
- Doctors of dental medicine or dental surgery practicing dentistry
- Doctors of podiatric medicine
- Doctors of optometry
- Chiropractors
- All legally authorized by the state to practice

### Covered Recipient Teaching Hospitals

- The hospitals that CMS has recorded as receiving payment(s) under Medicare direct graduate medical education (GME), indirect medical education (IME) or psychiatric hospitals IME programs
- Each year, Open Payments publishes a list of affected teaching hospitals; the list is available on the Open Payments website at <http://go.cms.gov/openpayments>

### Physician Owners or Investors

- Physicians who are owners or investors of an applicable manufacturer or GPO
- Immediate family members who have ownership or investment interest in an applicable manufacturer or GPO: spouse, natural or adoptive parent, child, or sibling, stepparent, stepchild, stepbrother, or stepsister, father-, mother-, daughter-, son-, brother-, or sister-in-law, grandparent or grandchild, spouse of a grandparent or grandchild

# **Open Payments (the Sunshine Act) Registration Overview**

# Registration Overview

- Registration is **required** for physicians and teaching hospitals to review or dispute the following information reported about them by applicable manufacturers and GPOs:
  - Payments made to physicians and teaching hospitals,
  - Other transfers of value made to physicians and teaching hospitals, or
  - Ownership or investment interests held by physicians or their immediate family members
- Registration will be conducted in two phases this first reporting year.

# Phase 1 Registration for Physicians and Teaching Hospitals: EIDM

- Begins June 1, 2014
  - Physicians and teaching hospitals register in EIDM
  - Request access to the Open Payments system via EIDM



# Phase 2 Registration for Physicians and Teaching Hospitals: Open Payments System

- Begins July 2014
  - Physicians and teaching hospitals use EIDM registration credentials to register in the Open Payments system
  - Once physicians and teaching hospitals are registered in the Open Payments system, they are able to participate in the review, and dispute process



*\*Guidance on how to use EIDM registration credentials to register in the Open Payments system, and how to review and dispute submitted data is forthcoming*

# **Phase 1 Registration in EIDM: Identity Verification Process**



# EIDM Identity Verification Overview

- CMS' Enterprise Identity Management system (EIDM) is how CMS verifies user identities
- Identity verification is the process of providing information (e.g., identity history, credentials, or documents) for the purpose of proving that a person is the same person he or she claims to be
- Individuals requesting electronic access to CMS protected information or systems must first have their identities verified

# EIDM Identity Verification (cont.)

- All users who register for EIDM have their identities verified
- EIDM matches information entered by users to information provided by Experian
- Out of Wallet (OOW) questions are also used to verify identity
- OOW questions ask for private data and contain information pulled from your credit report such as:
  - Mortgage lender name
  - Previous employer name
  - Auto lender name
- OOW questions and answers are shared **only** between the EIDM registrant and the verification service provider, Experian; the information will **not** be stored in EIDM

# EIDM Identity Verification (cont.)

- A soft credit inquiry will be made during EIDM registration
- Soft credit inquiries are visible only to the EIDM registrant and **only** appear on credit reports produced by Experian (shown as an inquiry made by CMS)
- Identity proofing does **not** affect credit score
- Contact Experian Proofing Support Services for assistance with failed identity proofing:  
1-866-578-5409

# **Phase 1 Registration: EIDM New User Registration**

# EIDM Registration Overview

- EIDM registration is required for access to the Open Payments system
- EIDM registration process is the same for all users
- You may already have an EIDM account if you use the Health Insurance Oversight System (HIOS), the Medicaid and CHIP Program System (MACPro), or other CMS systems

# Step 1: Go to CMS Enterprise Portal and Select “New User Registration”

<https://portal.cms.gov>

The screenshot shows the CMS.gov Enterprise Portal. The header includes the CMS.gov logo, 'Enterprise Portal', and navigation links like Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the header, there's a search bar and a 'Learn about your healthcare options' link. The main content area features a large banner with the text 'Welcome to CMS Enterprise Portal' and a description of the portal's purpose. To the right of the banner is a 'CMS Secure Portal' section with a 'Login to CMS Secure Portal' button and links for 'Forgot User ID?', 'Forgot Password', and 'New User Registration' (which is circled in red). Below the banner is a navigation bar with links for 'CMS Enterprise Portal', 'Medicaid/CHIP', 'Medicare Shared Savings Program', and 'Physician Value'. At the bottom, there's a section titled 'CMS Provides Health Coverage for 100 Million People...' with a sub-header '...through Medicare, Medicaid, and the Children's Health Insurance Program. And with health insurance reforms and health care exchanges, we are improving health care and ensuring coverage for all Americans.' This section includes logos for Medicare.gov and InsureKidsNow.gov, along with links to 'Information for people with Medicare, Medicare open enrollment, and benefits' and 'Information for children up to the age of 19 in need of health care coverage'. On the far right, there's a 'CMS News' section with links to 'States Moving Forward to Implement Health Reform', 'Easier electronic funds transfers mean more time with patients and cost savings', and 'Healthcare Professionals Selected as Innovation Advisors will Improve Care'.

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

Home | About CMS | Newsroom | Archive | Help & FAQs | Email | Print |

Learn about [your healthcare options](#)

Health Care Quality Improvement System | Provider Resources


CMS Portal > Welcome to CMS Portal

## Welcome to CMS Enterprise Portal

The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.

**CMS Secure Portal**

To log into the CMS Portal a CMS user account is required.


 [Login to CMS Secure Portal](#)


[Forgot User ID?](#)  
[Forgot Password?](#)  
[New User Registration](#)

**CMS Enterprise Portal** | Medicaid/CHIP | Medicare Shared Savings Program | Physician Value

## CMS Provides Health Coverage for 100 Million People...

...through Medicare, Medicaid, and the Children's Health Insurance Program. And with health insurance reforms and health care exchanges, we are improving health care and ensuring coverage for all Americans.

 [Information for people with Medicare, Medicare open enrollment, and benefits.](#)

 [Information for children up to the age of 19 in need of health care coverage.](#)

## CMS News

[States Moving Forward to Implement Health Reform](#)

[Easier electronic funds transfers mean more time with patients and cost savings](#)

[Healthcare Professionals Selected as Innovation Advisors will Improve Care](#)

# Step 2: Accept Terms & Conditions

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

[Home](#) | [About CMS](#) | [Newsroom](#)

Learn about [your healthcare options](#)

Health Care Quality Improvement System | Provider Resources

CMS Portal > Registration

Screen reader mode Off | Accessibility Settings

## Terms and Conditions

### Consent To Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#) for more details.

### Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#) which describes how we use the information you provide.

### Collection Of Personal Identifiable Information (PII)

"Personal" information is described as data that is unique to an individual, such as a name, address, telephone number, social security number and date of birth (DOB).

CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal data to uniquely identify the user registering with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

I agree to the terms and conditions ☒

CancelNext



# Step 2: Accept Terms & Conditions (cont.)

- Two sections are particularly important to read:
  1. Consent to monitoring
  2. Collection of Personal Identifiable Information or PII
- **Consent to monitoring** means that you agree to allow CMS to monitor you while you are on systems accessed through EIDM
- **PII** is information that can be used to uniquely identify, contact, or locate a single person or can be used with other sources to uniquely identify a single individual; PII is collected to aid in the identity verification process
- Identity verification is required for all users requesting access to any CMS application
- Personal information collected will be used for the purposes of verifying your identity **only**
- Once you have read the terms and conditions, check the box labeled “I agree to the terms and conditions” before selecting “Next” to continue



# Step 3: Enter Personal Information

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

[Home](#) | [About CMS](#) | [Newsroom](#)  
[Learn about your healthcare options](#)

[Health Care Quality Improvement System](#) [Provider Resources](#)

CMS Portal > Registration

Enter your legal first name and last name, as it may be required for identity verification.

\* First Name:  Middle Name:

\* Last Name:  Suffix:

Enter your email address, as it will be used for account related communications.

\* E-mail Address:

Re-enter your email address.

\* Confirm E-mail Address:

Enter your full 9 digit social security number, as it may be required for identity verification.

Social Security Number:

Enter your date of birth in MM/DD/YYYY format, as it may be required for identity verification.

\* Date of Birth:

Enter your current or most recent home address, as it may be required for identity verification.

\* Home Address Line 1:

Home Address Line 2:

\* City:  \* State:  \* Zip Code:  Zip Code Extension:  Country: USA

Enter your primary phone number. Enter the last four digits of your primary phone number.

\* Primary Phone Number:

Required fields are marked with an asterisk.

Completing all fields, even those that are not required, will speed-up identity verification.

# Step 4: Select User ID, Password, and Challenge Questions

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

[Home](#) | [About](#)  
[Learn about your health](#)

**Health Care Quality Improvement System** **Provider Resources**

CMS Portal > Registration

Screen reader mode Off | Accessibility Settings

Choose User ID and Password [Create User](#) Choose User ID and Password

## Choose User ID And Password

- User ID

- Password

- Confirm Password

## Select your Challenge Questions and Answers:

Your challenge questions and answers will be required for password and account management functions.

- Question:1

- Question:2

- Question:3

- Answer:1

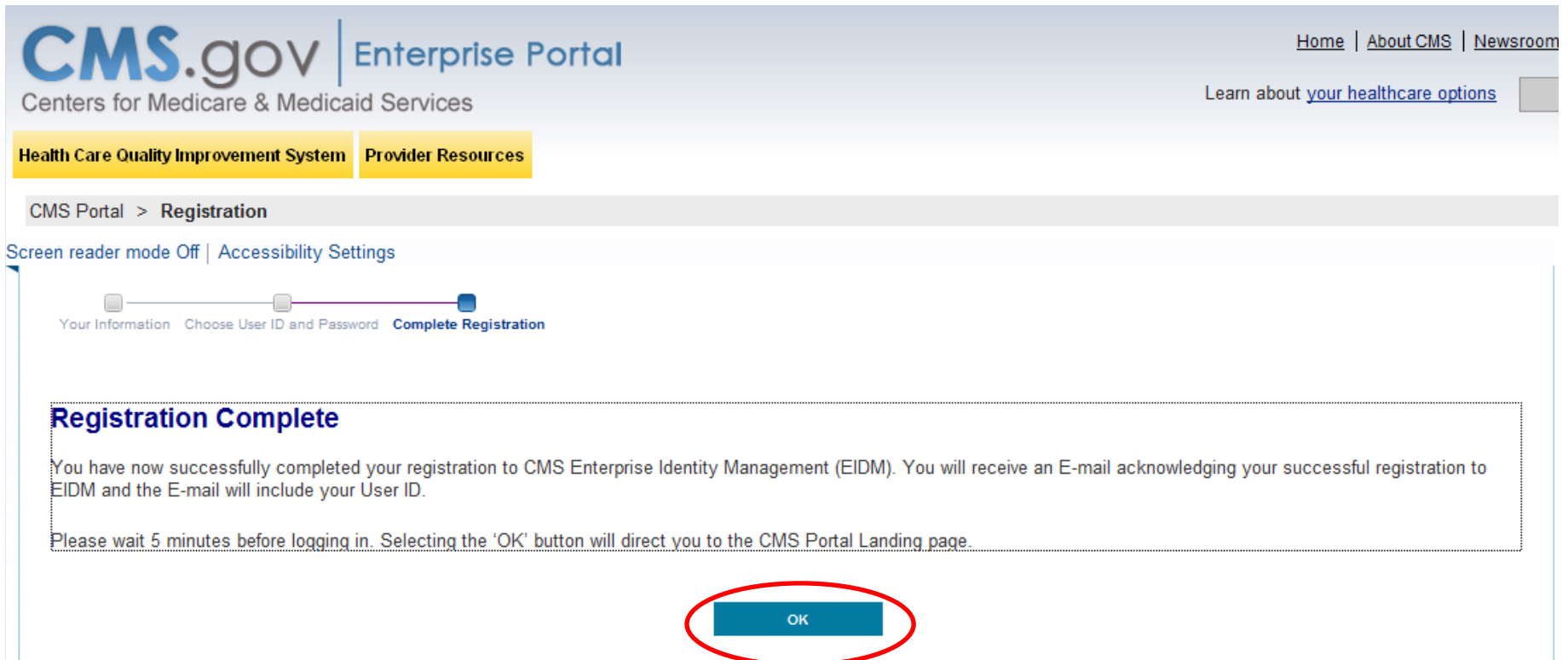
- Answer:2

- Answer:3

# User ID and Password Criteria

- User ID
  - Must be a minimum of 6 and a maximum of 74 characters
  - Special characters permitted: dashes (-), underscores (\_), apostrophes ('), periods (.), and at signs (@)
- Password
  - Must be a minimum of 8 and a maximum of 20 characters
  - Must contain at least 1 number, 1 uppercase letter, and 1 lowercase letter
  - Cannot contain your user ID and must differ from your previous 6 passwords
  - Must be changed every 60 days
  - EIDM will prompt for password change when the 60 day deadline approaches

# Step 5: Registration Complete



The screenshot shows the CMS.gov Enterprise Portal interface. At the top, the CMS.gov logo is on the left, and navigation links for Home, About CMS, and Newsroom are on the right. Below the logo, the text 'Centers for Medicare & Medicaid Services' is displayed. Two yellow buttons, 'Health Care Quality Improvement System' and 'Provider Resources', are positioned below the header. A breadcrumb trail shows 'CMS Portal > Registration'. A progress bar indicates three steps: 'Your Information', 'Choose User ID and Password', and 'Complete Registration', with the third step being the active one. The main content area features a 'Registration Complete' heading, followed by a message stating that registration to CMS Enterprise Identity Management (EIDM) is successful and that an email with the user ID will be sent. It also advises waiting 5 minutes before logging in and notes that clicking the 'OK' button will lead to the CMS Portal Landing page. The 'OK' button is a blue rectangle with white text, circled in red.

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

[Home](#) | [About CMS](#) | [Newsroom](#)

[Learn about your healthcare options](#)

Health Care Quality Improvement System | Provider Resources

CMS Portal > Registration

Screen reader mode Off | Accessibility Settings

Your Information | Choose User ID and Password | **Complete Registration**

### Registration Complete

You have now successfully completed your registration to CMS Enterprise Identity Management (EIDM). You will receive an E-mail acknowledging your successful registration to EIDM and the E-mail will include your User ID.

Please wait 5 minutes before logging in. Selecting the 'OK' button will direct you to the CMS Portal Landing page.

**OK**

Click on “OK” to exit and return to the CMS Enterprise Portal home page.

After clicking on OK, you will receive a confirmation email message that contains your user ID and a link to the CMS Enterprise Portal.

# Confirmation Email

From: ■ donotreply@cms.gov

Sent: Mon 5/5/2014 2:13 PM

To:

Cc:

Subject: Enterprise Identity Management System (EIDM) Account Registration

Dear Jane Taylor

Thank you for registering. The User ID that you have chosen is OUTUSER21. You can log in to the CMS Portal using the following link with your User ID and Password.

Please keep this E-mail for your records.

<https://portalval.cms.gov>

Thank you,  
CMS Enterprise Identity Management System

Please do not reply to this system generated E-mail.

# Unsuccessful EIDM Registration

- Individuals with addresses outside of the United States may not register successfully in EIDM
- They should contact the Open Payments Help Desk for assistance with EIDM registration
- Any additional EIDM issues should be directed to the Open Payments Help Desk at [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov)

# **Using EIDM Registration Credentials to Request Access to the Open Payments System**

# Requesting Access to the Open Payments System

- In Phase 2 registration, this request in EIDM will allow the individual access to the Open Payments system
- Request for this access can occur only after EIDM registration is successful
- Request for this access is made through the CMS Enterprise Portal



# Step 1: On CMS Enterprise Portal, select “Login to CMS Secure Portal”

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

Home | About CMS | Newsroom | Archive | Help & FAQs | Email | Print |  
Learn about [your healthcare options](#) Search CMS.gov

Health Care Quality Improvement System | Provider Resources

CMS Portal > Welcome to CMS Portal

## Welcome to CMS Enterprise Portal

The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.

[CMS Enterprise Portal](#) | [Medicaid/CHIP](#) | [Medicare Shared Savings Program](#) | [Physician Value](#)

### CMS Secure Portal

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[Forgot User ID?](#)  
[Forgot Password?](#)  
[New User Registration](#)

### CMS News

[States Moving Forward to Implement Health Reform](#)  
[Easier electronic funds transfers mean more time with patients and cost savings](#)  
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## CMS Provides Health Coverage for 100 Million People...

...through Medicare, Medicaid, and the Children's Health Insurance Program. And with health insurance reforms and health care exchanges, we are improving health care and ensuring coverage for all Americans.

[Medicare.gov](#) [Information for people with Medicare, Medicare open enrollment, and benefits.](#)

[InsureKidsNow.gov](#) [Information for children up to the age of 19 in need of health care coverage.](#)

# Step 2: Accept Terms & Conditions

 **Enterprise Portal**  
Centers for Medicare & Medicaid Services

Home | About CMS | Newsroom | Archive |  Help & FAQs |  Email |  Print

Health Care Quality Improvement System | Provider Resources

## Terms and Conditions

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:  
You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.  
At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.

# Step 3: Enter EIDM User ID and Password

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services



Home | About CMS | Newsroom | Archive | [? Help & FAQs](#) | [Email](#) | [Print](#)

Health Care Quality Improvement System | Provider Resources

## Welcome to CMS Enterprise Portal

User ID

Password

  [Log In](#) [Cancel](#)

[Forgot Password?](#)  
[Forgot User ID?](#)  
Need an account? Click the link - [New user registration](#)

# Step 4: Select “Request Access Now” under “Request Application Access”

After a successful CMS Enterprise Portal login, you will be taken to the CMS Portal home page (shown below).

Portal Help & FAQs Print Log Out Welcome Jennifer Doyle

CMS.gov Enterprise Portal

My Portal

CMS Portal > My Portal

## Welcome to CMS Enterprise Portal

The Enterprise Portal combines and displays content and forms from multiple applications, supports users with navigation and cross-enterprise search tools, supports simplified sign-on, and uses role-based access and personalization to present each user with only relevant content and applications. The vision of the Enterprise Portal is to provide "one-stop shopping" capabilities to improve customer experience and satisfaction.

### Provisioning

There are several ways to get access to applications in the CMS Enterprise Portal

1. [EIDM](#) - To get access to applications that are supported by EIDM click [here](#).
2. [EUA](#) - To get access to applications that are supported by EUA click [here](#). Please click the [EUA link](#) for more details.
3. [IACS](#) - To get access to applications that are supported by IACS click [here](#).

## Request Application Access

Use the link below to request access to more applications.

[Request Access Now](#)

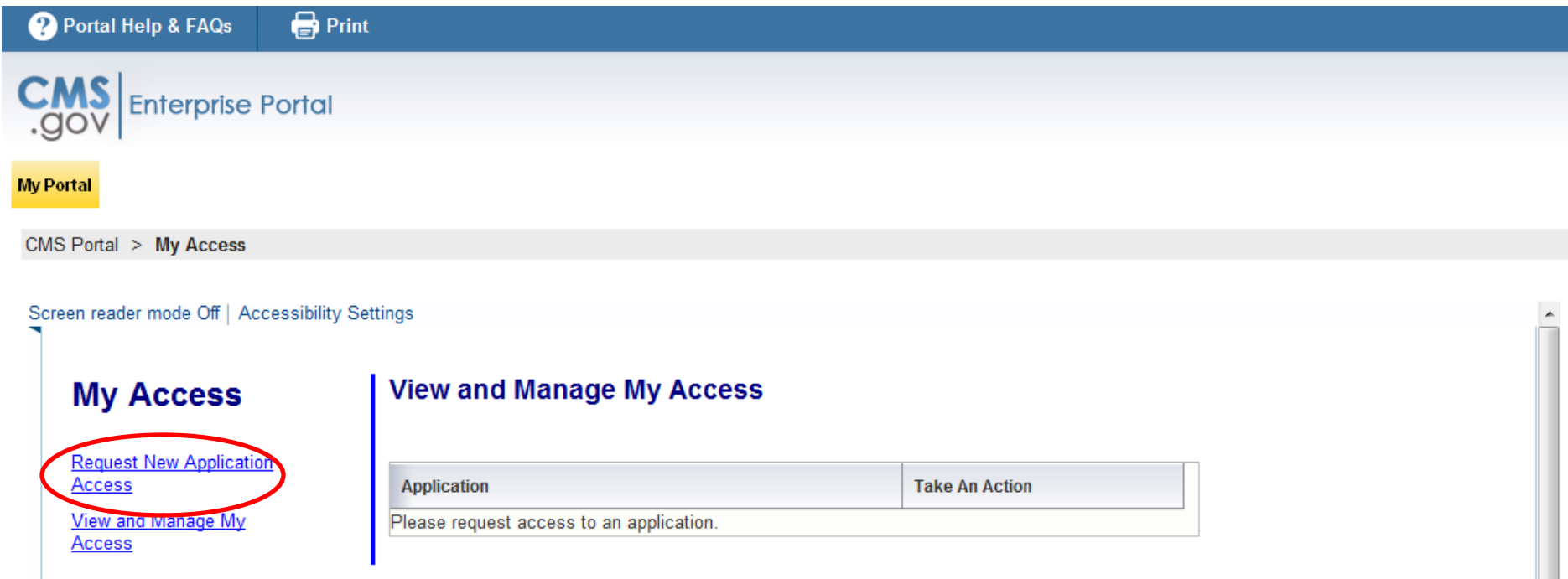
## Contact Help Desk

**FFE / HIOS / Agents & Brokers Help Desk** - Contact the Exchange Operations Support Center [XOSC] at [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov) or 1-855-CMS-1515

**Physician Value / PQRS Help Desk** - Contact the PV/PQRS Information Center at 1-888-734-6433.

**ACO Help Desk** - Contact the ACO Information Center at 1-888-734-6433 (select option 2) if you have any questions about using the ACO Portlet features. TTY users should call 1-888-734-6563.

# Step 5: Select “Request New Application Access”



The screenshot shows the CMS Enterprise Portal interface. At the top, there is a navigation bar with links for "Portal Help & FAQs" and "Print". Below this is the "CMS.gov | Enterprise Portal" header. A yellow "My Portal" button is visible. The main content area shows the breadcrumb "CMS Portal > My Access". On the left, under the "My Access" heading, the link "Request New Application Access" is circled in red. Below it is the link "View and Manage My Access". On the right, under the "View and Manage My Access" heading, there is a table with two columns: "Application" and "Take An Action". The table contains one row with the text "Please request access to an application."

Portal Help & FAQs Print

CMS.gov | Enterprise Portal

My Portal

CMS Portal > My Access

Screen reader mode Off | Accessibility Settings

**My Access**

[Request New Application Access](#)

[View and Manage My Access](#)

**View and Manage My Access**

Application	Take An Action
Please request access to an application.	

If you have access to other CMS applications, you will see those applications listed in the “View and Manage My Access” table.

# Step 6: Select Application and Role

Portal Help & FAQs Print

**CMS**.gov Enterprise Portal

My Portal

CMS Portal > My Access

Screen reader mode Off | Accessibility Settings

**My Access**

[Request New Application Access](#)

[View and Manage My Access](#)

**Request New Application Access**

Select an application and then a role to request access.

Application Description: OPENPAYMENTS - Open Payments /


Role: Applicable Manufacturer, GPO, Physi

Cancel Submit

- Application Description: “Open Payments”
- Role: “Applicable Manufacturer, GPO, Physician, or Teaching Hospital”

# Step 7: Review Identity Verification Information

[Portal Help & FAQs](#) [Print](#)

 Enterprise Portal

My Portal

CMS Portal > My Access

Screen reader mode Off | [Accessibility Settings](#)

## My Access

[Request New Application Access](#)

[View and Manage My Access](#)

## Identity Verification

You have selected a role that requires a higher level of security. You will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

- Ensure that you have entered your legal name, current home address, primary phone number and email address correctly. We will only collect personal information to verify your identity with Experian, an external identity verification provider.
- Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
- Confirm that you have your personal and financial information available, as the Experian application will pose questions to you, based on data in their files. You may want to obtain a copy of your credit report, before proceeding with the role request by selecting this link and following the directions provided - <http://www.experian.com>. For additional information, please see the Experian Consumer Assistance link - <http://www.experian.com/help>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. Do you want to continue?

[Cancel](#) [Next](#)

# Step 8: Accept Terms & Conditions

[? Portal Help & FAQs](#) [Print](#)

**CMS**.gov Enterprise Portal

My Portal

CMS Portal > My Access

Screen reader mode Off | Accessibility Settings

## My Access

[Request New Application Access](#)

[View and Manage My Access](#)

## Terms and Conditions

### Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, social security number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

### HHS Rules Of Behavior

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

### Identity Verification

I understand that the identity proofing services being requested are regulated by the Fair Credit Reporting Act and that my explicit consent is required to use these services. I understand that any special procedures established by CMS for identity proofing using Experian have been met and the services requested by CMS to Experian will be used solely to confirm the applicant's identity to avoid fraudulent transactions in the applicant's name.

I agree to the terms and conditions ☒

[Cancel](#) [Next](#)



# Step 9: Confirm Your Information

Portal Help & FAQs Print

**CMS.gov** Enterprise Portal

CMS Portal > My Access

Screen reader mode Off | Accessibility Settings

## My Access

[Request New Application Access](#)  
[View and Manage My Access](#)

### Your Information

Your information Verify Your Identity

Enter your legal first name and last name, as it may be required for identity verification.

- First Name:  Middle Name:

- Last Name:  Suffix:

Enter your email address, as it will be used for account related communications.

- E-mail Address:

Re-enter your email address.

- Confirm E-mail Address:  Enter the same E-mail address you entered before.

Enter your full 9 digit social security number, as it may be required for identity verification.

Social Security Number:

Enter your date of birth, as it may be required for identity verification.

- Date of Birth:

Some fields will be pre-populated with information from your EIDM profile.

Confirm its accuracy; edit fields to correct errors.

# Step 9: Confirm Your Information (cont.)

---

Enter your current or most recent home address, as it may be required for identity verification.

- Home Address Line 1:

Home Address Line 2:

- City:

- State:

- Zip Code:

Zip Code Extension:

Country: USA

---

Enter your primary phone number, as it may be required for identity verification.

- Primary Phone Number:

---

Cancel

Next

# Step 10: Verify Identity

The screenshot shows the 'Verify Identity' step in the CMS Enterprise Portal. The page has a blue header with 'Portal Help & FAQs' and 'Print' links. Below the header is the 'CMS.gov Enterprise Portal' logo and a 'My Portal' button. A breadcrumb trail shows 'CMS Portal > My Access'. A status bar at the top indicates 'Screen reader mode Off | Accessibility Settings'.

The main content area is titled 'My Access' and includes links for 'Request New Application Access' and 'View and Manage My Access'. The 'Verify Identity' section is active, showing a progress bar with 'Your Information' and 'Verify Your Identity' steps. The 'Verify Your Identity' step contains three questions, each with a list of radio button options and a 'NONE OF THE ABOVE' option. The questions are:

- Please select the county for the address you provided.
- According to our records, you previously lived on . Please choose the city from the following list where this street is located.
- Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.
- Which of the following is a previous phone number of yours? If there is not a matched phone number, please select 'NONE OF THE ABOVE'.

At the bottom of the form are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted with a red circle.

As previously explained, identity proofing questions are pulled from the “soft-credit” inquiry done during EIDM registration.

“Out-of-Wallet” (OOW) questions are based upon information in your credit report.

# Step 11: Verifying Identity Successful

[? Portal Help & FAQs](#) [Print](#)

**CMS**.gov | Enterprise Portal

My Portal

CMS Portal > My Access

Screen reader mode Off | [Accessibility Settings](#)

## My Access

[Request New Application Access](#)

[View and Manage My Access](#)

## Complete Step Up

You have successfully completed the Remote Identity Proofing process.

[Next](#)

# Step 12: Requesting Application Access Successful

The screenshot displays the CMS.gov Enterprise Portal interface. At the top, there is a navigation bar with links for 'Portal Help & FAQs' and a 'Print' button. Below this, the CMS.gov logo and 'Enterprise Portal' text are visible. A yellow 'My Portal' button is located on the left. A breadcrumb trail shows 'CMS Portal > My Access'. Below the breadcrumb, there is a link for 'Screen reader mode Off | Accessibility Settings'. On the left side, under the 'My Access' heading, there are two links: 'Request New Application Access' and 'View and Manage My Access'. The main content area is titled 'Request Acknowledgement' and contains the message: 'Your request has successfully completed. You will need to logout and then log in to access the OPENPAYMENTS Application. Select 'OK' to continue.' A blue 'OK' button is highlighted with a red circle.

Portal Help & FAQs Print

CMS.gov Enterprise Portal

My Portal

CMS Portal > My Access

Screen reader mode Off | Accessibility Settings

**My Access**

[Request New Application Access](#)

[View and Manage My Access](#)

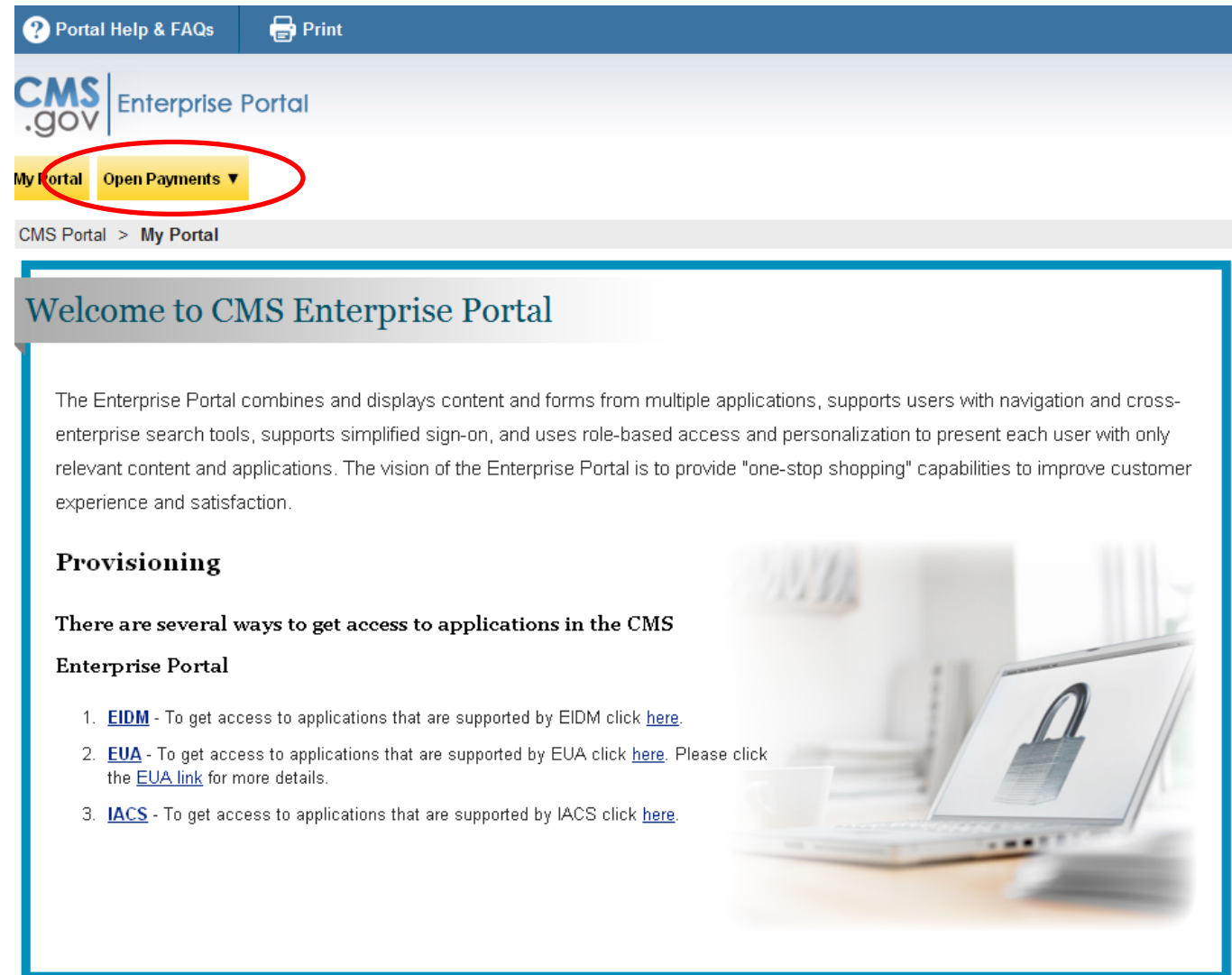
**Request Acknowledgement**

Your request has successfully completed. You will need to logout and then log in to access the OPENPAYMENTS Application. Select 'OK' to continue.

OK

- Access may take a few minutes to process
- Log out of EIDM and log back in to view if it was successful

# Open Payments Access Successful



The screenshot shows the CMS Enterprise Portal interface. At the top, there is a navigation bar with a question mark icon and the text 'Portal Help & FAQs', and a printer icon with the text 'Print'. Below this is the CMS.gov logo and the text 'Enterprise Portal'. A yellow menu bar contains two items: 'My Portal' and 'Open Payments' with a downward arrow. The 'Open Payments' item is circled in red. Below the menu bar, the breadcrumb 'CMS Portal > My Portal' is visible. The main content area has a heading 'Welcome to CMS Enterprise Portal' and a paragraph describing the portal's features. Below this is a section titled 'Provisioning' with a subheading 'There are several ways to get access to applications in the CMS Enterprise Portal'. This section contains a list of three items: 1. EIDM - To get access to applications that are supported by EIDM click [here](#). 2. EUA - To get access to applications that are supported by EUA click [here](#). Please click the [EUA link](#) for more details. 3. IACS - To get access to applications that are supported by IACS click [here](#). The background of the main content area features a blurred image of a laptop displaying a padlock icon.

Portal Help & FAQs Print

CMS.gov Enterprise Portal

My Portal Open Payments ▼

CMS Portal > My Portal

## Welcome to CMS Enterprise Portal

The Enterprise Portal combines and displays content and forms from multiple applications, supports users with navigation and cross-enterprise search tools, supports simplified sign-on, and uses role-based access and personalization to present each user with only relevant content and applications. The vision of the Enterprise Portal is to provide "one-stop shopping" capabilities to improve customer experience and satisfaction.

### Provisioning

There are several ways to get access to applications in the CMS Enterprise Portal

1. [EIDM](#) - To get access to applications that are supported by EIDM click [here](#).
2. [EUA](#) - To get access to applications that are supported by EUA click [here](#). Please click the [EUA link](#) for more details.
3. [IACS](#) - To get access to applications that are supported by IACS click [here](#).

Log back into the CMS Enterprise Portal to see the Open Payments tab in the menu bar at the top of the screen.

It may take a few minutes for the Open Payments tab to appear.

# Next Steps

# What You Can Do Now

- Complete Phase 1 by:
  - Registering for your EIDM user ID and password
  - Requesting access to the Open Payments system via EIDM
- Review resources on the CMS Open Payments website:  
<http://go.cms.gov/openpayments>
- Register on CMS listserv to receive e-mail updates about the Open Payments program – go to <http://go.cms.gov/openpayments> and enter email address on the main page, in the "Email Updates" box



# 2014 Open Payments Timeline

Feb	March	April	May	June	July	Aug	Sept
<b>Phase 1 Registration and Submission</b> <ul style="list-style-type: none"><li>• Applicable manufacturers and applicable GPOs</li><li>• Submission of corporate profile and aggregate data</li></ul>				<b>Phase 2 Registration and Submission For Industry</b> <ul style="list-style-type: none"><li>• Applicable manufacturers and applicable GPOs<ul style="list-style-type: none"><li>• Step 1 – June 1 – June 30</li><li>• Step 2 – June 9 – June 30</li></ul></li></ul>			<b>Detailed data published on public-facing CMS website</b>
				<b>Phase 1 Registration for Physicians and Teaching Hospitals</b> <ul style="list-style-type: none"><li>• CMS Enterprise Portal (EIDM)</li></ul>			
					<b>Phase 2 Registration for Physicians and Teaching Hospitals</b> <ul style="list-style-type: none"><li>• Open Payments system</li></ul>		
					<b>Review, Dispute, and Corrections</b>		

# Resources Available

- CMS Open Payments website:  
<http://go.cms.gov/openpayments>
  - “Physician” and “Teaching Hospital” pages of the website
  - “Events” page: Open Payments technology-focused webinar recordings and materials, plus a schedule of upcoming webinars
  - “Program Registration” page: Supplemental materials, instruction documents, FAQs & other resources
- Open Payments Help Desk:
  - [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) or 855-326-8366